Scan2CRM

User Guide
Version 2.2.1, 2010

This publication contains proprietary information of Card Scanning Solutions, provided for customer use only. No other uses are authorized without the express written permission of Card Scanning Solutions.

I - Warranty
Card Scanning Solutions provides this publication "as is" without warranty of any kind, either expressed or implied, including, but not limited to, the implied warranties of merchantability or suitability for any particular purpose.
Card Scanning Solutions reserves the right to revise this publication, and to make changes in the content hereof from time to time without notification. Some countries or states in the USA do not allow a disclaimer of expressed or implied warranties in certain transactions; if you are a resident of such country or state, this statement may not apply to you.
Changes are made periodically to the information herein; these changes will be incorporated in new editions of the publication. Card Scanning Solutions may make improvements and/or changes in the products and/or the software described in this publication at any time.

II - Notice to user
This user guide should not be construed as a representation or warranty with respect to the software named herein. Occasionally, changes or variations exist in the software that are not reflected in the manual. Generally, if such changes or variations are known to exist and to affect the product significantly, a release note or "read me" file accompanies the user guide and/or the distributed software. In that event, be sure to read the release note or "read me" file before using the product.

III - Publication
The descriptions, specifications, design and procedures contained in this user guide were effective at the time of publication of this document. Card Scanning Solutions reserves the right to modify any of the above at any time without notice and without incurring obligations.

IV - Trademarks
All trademarks are the property of their respective holders and are hereby acknowledged.
# TABLE OF CONTENTS

1. INTRODUCTION .................................................................................................................. 4
   - Overview ............................................................................................................................ 4
   - Features ............................................................................................................................... 4
   - Scanner Specifications ...................................................................................................... 4

2. GETTING STARTED ............................................................................................................... 5
   - Before Using the Scanner ................................................................................................. 5
   - Minimum System Requirements ...................................................................................... 5
   - Connecting the Scanner .................................................................................................... 5
   - Installation ......................................................................................................................... 5
   - Uninstall ............................................................................................................................. 6

3. USING SCAN2CRM ............................................................................................................ 7
   - Login .................................................................................................................................. 7
   - Application Interface ......................................................................................................... 7
   - Scanning cards .................................................................................................................. 8
   - Working online .................................................................................................................. 8
   - Scanned data window ......................................................................................................... 9

4. APPLICATION CONFIGURATION ....................................................................................... 10
   - CRM .................................................................................................................................... 10
   - Salesforce CRM ............................................................................................................... 11
   - Utilities ............................................................................................................................... 11
   - Scanner Calibration ......................................................................................................... 11
   - Cleaning the scanner ....................................................................................................... 12

5. APPENDIX A: TROUBLESHOOTING ............................................................................... 12
1. INTRODUCTION

Overview

Scan2CRM is an application that reads business cards, and automatically inputs both their
textual data and image to a new contact record in your CRM application, either through the
Internet or locally.

Within seconds of placing a card into the scanner, Scan2CRM pulls the information off the card
using OCR – Optical Character Recognition technology, and automatically populates the text
fields of a new contact record in your CRM software (name, title, phone number, etc.), while
also capturing an image file of the card.
Scan2CRM works directly with CRM applications, making it the only business card scanning
package that does not require cards to be scanned into a 3rd party application before the
information can be imported into CRM software.

Features

- Full integration with CRM software - Scans business cards directly and automatically into
  CRM software
- Capture both data and image
- Just a few seconds per scan
- Auto detect function - just place the card in the scanner

Scanner Specifications

- Powered by the computer USB – No external power source is needed
- Small footprint
- Fully mobile
2. GETTING STARTED

Before Using the Scanner

The scanner has been carefully packaged to avoid damage during transportation. Before operating the scanner, please remove the packaging materials. After removing the packaging materials, you will find the following:

- ScanShell scanner
- USB interface cable
- Calibration paper
- Cleaning paper
- Cardboard cutout with software download link.

Minimum System Requirements

The minimum system requirements are:

- Pentium IV with 512MB
- USB port
- Microsoft Outlook 2000 or higher installed

Connecting the Scanner

The scanner is connected to the computer via the USB port. To connect the scanner, do the following:

- Place the scanner on a flat, firm, solid surface with easy access.
- Plug the USB interface cable into the USB port of the computer.

Installation

To install the software on the computer, do the following:

1. Close all programs.
2. We recommend downloading the program before connecting the scanner.
3. Locate the license key on outside of the box (16 characters)
4. Go to the software download link: http://autorun.card-reader.com from the Cardboard cutout insert and type the license key in the box.
5. Install the program after the download has finished, and select the scanner model during the setup.
6. Setup will check if Microsoft .NET framework 1.1 or higher is installed on your computer. If it is not installed, setup will prompt you to install it. Click "Yes" to install Microsoft .NET framework or "No" to skip Microsoft .NET framework installation. Please note that if
Microsoft .NET framework 1.1 or higher is not installed on your computer, you will not be able to install and use Scan2CRM.

7. Select your CRM software from the list when prompted.
8. Attach the scanner after setup has finished
9. After the Add new hardware wizard dialog box appears, click Next to install the drivers automatically.
10. After you specify the driver, click Next.
11. You will be presented with a standard Windows message. Note: Scanner model may vary.

Click Continue Anyway. The installation of Scanshell scanner drivers is safe for your computer and will not affect your system.

- Click ‘Next’ until the installation is complete.

Uninstall

To uninstall the software, open the Add-Remove Programs located in the control panel. Select Scan2CRM and click on Add/Remove. Follow the uninstall instructions until the operation is completed.
3. USING SCAN2CRM

Login

Fill in your user name and password, and select your CRM software from the list.

Application Interface

Scan2CRM puts up a small toolbar, which can be dragged and placed anywhere on the screen.

Scan2CRM Toolbar

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable/Disable Scanning.</td>
<td>If enabled and the scanner is connected, inserting a card into the scanner will start the scanning process automatically. Scanning cannot take place if Scan2CRM is disabled</td>
</tr>
<tr>
<td>Green=enabled, scanner is connected</td>
<td></td>
</tr>
<tr>
<td>Red=disabled, scanner is disconnected</td>
<td></td>
</tr>
<tr>
<td>CRM connected</td>
<td>Press this button to bring up the login window, in which you can select your CRM software and connect to it if it is not connected.</td>
</tr>
<tr>
<td>CRM disconnected</td>
<td></td>
</tr>
<tr>
<td>Open the Configuration Window</td>
<td></td>
</tr>
</tbody>
</table>
### Scanning cards

### Working online

When working online, **Scan2CRM** is connected to the CRM software, which can be either an Internet/Intranet CRM application displayed in a browser, or locally installed accessed through the network.

1. Make sure the scanner is enabled (The Enable button is green meaning the application is enabled and the scanner is connected). Otherwise press on the button, select your CRM application and connect).
2. Insert a card into the scanner. The card will be scanned automatically and the following window containing the scanned data will open:
3. You can edit details and add more details in empty fields.
   **Note:** Fields marked in red must be filled in. The layout and mandatory fields can change according to the CRM system or individual configuration.

4. Click OK to save the record. The record will be saved automatically in your CRM Software. If you selected "Open the scanned card in the CRM application" option in the program settings (see **Application Configuration, CRM, page**), the new record will be displayed in your CRM application. If this option is not selected, the record will be silently saved in your CRM application in the background.
   **Note:** If you use Internet-based CRM software, it does not have to be opened in the internet browser. The data transfer will take place silently in the background.
4. APPLICATION CONFIGURATION

CRM

To open the application settings, press the Configuration button.

Configurations → General tab

Card Type → Business card – The scanned card will be handled as a Business card.

Configuration → CRM tab

This window allows you to configure the selected CRM application's specific parameters.

Note: The options available in the CRM section change according to the CRM application you select when starting the program.
Salesforce CRM

- **Item Type** – Select either Lead or Contact.

- **Open scanned card in the CRM application** – Check this option to have the scanned card opened in the CRM software automatically after saving. If unchecked the record will be saved silently to the CRM software.

- **Attach image** – Allows you to attach the image of the card to the record (only in the case of contacts).

Utilities

Configuration → Utilities tab

Scanner Calibration

Scanner calibration resets the scanner color sensor and generates higher accuracy in the OCR detection process. When you use the scanner for the first time, you will be prompted to calibrate the scanner. Calibrating the scanner is also a good idea if you notice deterioration in scanning and OCR quality.

- Insert the calibration paper that came with the scanner into the scanner.
- Click the ‘Calibrate Scanner’ button.

*Note: The scanner must be calibrated before the first use*
Cleaning the scanner

It is recommended to clean the scanner from time to time, especially if you notice irregularities and deterioration in scanning and OCR quality.

- Insert the cleaning paper that came with the scanner. You can add a few drops of alcohol or cleaning solution to the cleaning paper.
- Click the ‘Clean Scanner’ button.

5. APPENDIX A: TROUBLESHOOTING

Problem: When I try to enable Scan2CRM I get an error message, which says that another CSSN application is open.
Solution: Scan2CRM will not work while another CSSN application is running. To activate Scan2CRM, disable or close the other application and press on the state button in the toolbar.

Problem: The application CRM Connection State shows that it is Disabled on the startup.
Solution: Try to enable the application by pressing on the CRM button and performing login again.

Problem: There are irregularities or deterioration in scanning and OCR quality.
Solution: Clean and calibrate the scanner, see page 14

Problem: After I’ve logged in, it says the scanner is not connected.
Solution: Make sure the USB connection from the scanner is seated properly.

Problem: Login Must Use Security Token

Solution: When accessing salesforce.com from outside of your company’s trusted networks, you must add a security token to your password to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus.
Notes, or the Data Loader. You will need to log in to your SalesForce.com account and select Setup->Reset your
1. Click on the plus sign next to My “Personal Information” to expand
2. Click on Reset My Security Token
3. Click on Reset Security Token

Go back to S2CRM program and paste the security token from your email after your password.
For Example:
If your password = ”mypassword”
And your security token = “1234567890”
You must enter “mypassword1234567890” in place of your password